



Tax Season 2020: Information You Need to Partner with Head Start and Early Head Start Families

January 28, 2020



Today's Host

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Today's Conversation

Tax Season 2020: Information You Need to Partner with Head Start and Early Head Start Families



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What we will explore today...

- How to partner with families during the tax season.
- Tax credits and deductions and how to connect parents to free tax preparation.
- Online and in person tools and resources for this tax season.



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Chat Do's and Don'ts...

DO

- Do ask questions about tax preparation services and tax credits.
- Do read the previously posted question before asking a new one.



DON'T

- Don't post personal or identifiable information in the chat.
- Don't ask questions about a specific tax situation and how tax law applies.
- Don't be afraid to interact with your fellow webinar participants.



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Building Foundations for Economic Mobility Webinar Series



- Highlights research and exemplary practices in support of Head Start's and Early Head Start's (HS/EHS) two-generation mission
- Explores a core aspect of Family Well-Being



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Tax Time and HS/EHS Families

- Tax refunds can be the largest amount of money a family receives in a lump sum throughout the year.
- Refunds can be one tool to use when working on other financial goals.
- HS/EHS families may qualify for free tax preparation services.



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POLL



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Our Presenter

Don Dill

Senior Tax Analyst

SPEC Headquarters

IRS



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New Tax Laws

- Individual Shared Responsibility Payment for not having health insurance eliminated
- Key amounts increased to reflect impact of inflation
- New Tax Form – 1040SR
- Updated Form W-4 and tool – IRS Tax Withholding Estimator



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Deductions

- Deductions subtract tax from your income before your taxes are calculated.
- For example, if you have a \$1,000 tax deduction (home mortgage interest) and you are in the 10% tax bracket, the \$1,000 deduction saves you \$100 in taxes.



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Tax Credits

- You subtract tax credits from the amount of taxes you are supposed to pay.
- Credits can be nonrefundable meaning the IRS takes away from the amount you owe, but won't give you money for that credit.
- Or credits can be refundable meaning you get a refund based on that credit.



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EITC: The Earned Income Tax Credit

- The Earned Income Tax Credit is a refundable federal tax credit for taxpayers that meet eligibility rules.
- Because EITC is a refundable credit, it is possible to get a refund if a person does not owe any tax.



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EITC Central

- IRS website has section devoted to EITC: <https://www.eitc.irs.gov/>
- Section has wide array of information – ex: educational, marketing
- Visit the “Partner Toolkit”
- Communication Messages
- “Grab & Go” Products include audio files, newsletter articles, news releases, tweets, banners and ads.



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CTC: The Child Tax Credit

- The Child Tax Credit is a now a partially refundable federal credit.
- The maximum amount of the credit is \$2,000.
- Up to \$1,400 of the Child Tax Credit can be refundable based on taxpayer's income.



<https://www.irs.gov/credits-deductions/child-tax-credit-and-credit-for-other-dependents-at-a-glance>



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Refer Families to VITA and TCE Sites

- Help Families receive the credits they earned by referring them to local VITA and TCE sites where they get accurate returns prepared for free.
- Over 10,000 free sites across the nation
 - <https://www.irs.gov/individuals/find-a-location-for-free-tax-prep>
 - <https://secure.aarp.org/applications/VMISLocator/searchTaxAideLocations.action>



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Information to Bring to VITA/TCE Sites



Remember taxes are due April 15th! Some VITA/TCE sites may be open reduced or limited hours throughout the year.

<https://www.irs.gov/individuals/checklist-for-free-tax-return-preparation>



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Free File

<https://www.irs.gov/filing/free-file-do-your-federal-taxes-for-free>



VISIT

IRS.gov/freefile.
Convenience at your
finger tips. It's ready
when you are, 24/7.

REVIEW

Select the best match
for you from our
partner's offerings or
use a "help me" tool to
narrow your choices.

CONTINUE

Click "Leave IRS site"
to continue. You'll be
directed to our
partner's website to
begin your return
safely and securely.



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Form 8888	Allocation of Refund (Including Savings Bond Purchases)	OMB No. 1545-0047 2018 Attachment Sequence No. 56
Department of the Treasury Internal Revenue Service	▶ Go to www.irs.gov/Form8888 for the latest information. ▶ Attach to your income tax return.	
Name(s) shown on return		Your social security number



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Kris Linman
Director and Education Coordinator
Wray Head Start



WRAY SCHOOL DISTRICT
Home of the Eagles



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About Wray Head Start

- Roles and structure
- Parent engagement



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Engaging Parents at Tax Time

- Sharing resources
- How free tax preparation supports family goals
- Planning for next year



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Resources

- **Free Tax Return Preparation for Qualifying Payers:**

- <https://www.irs.gov/individuals/free-tax-return-preparation-for-you-by-volunteers>

- **Where's My Refund:**

- <https://www.irs.gov/refunds>



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Resources

- **Credits and Deductions:**

- <https://www.irs.gov/credits-deductions-for-individuals>

- **EITC Assistant:**

- <https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit/use-the-eitc-assistant>



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Resources

- **Interactive Tax Assistant:**
 - <https://www.irs.gov/help/ita>
- **Taxpayer Advocate Service:**
 - <https://taxpayeradvocate.irs.gov/>



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Q and A with Don and Kris



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Join Now!



Economic Mobility Learning Community

1. Register for an account:
<http://www.123contactform.com/form-2230355/My-Peers>
2. Wait for MangoApps email message (2-3 days)
3. Click the Login Link & create user profile
4. Find the EM learning community and click "Join" on the landing page



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Want to Take Your Family Engagement Practice to the Next Level?



Sign Up for Text4FamilyServices Today!

This FREE text messaging service was designed for family services providers.

It is also available in Spanish (español).

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What You Will Get When You Sign Up



- Two free text messages per month with information, tips, research, and links to helpful resources that will help you strengthen your work with children and families
- Announcements about upcoming events and professional development opportunities
- Access to the latest parent, family, and community engagement (PFCE) resources as soon as they are released

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Signing Up is Easy!



Just text “PFCE” to 22660 to sign up!

Text “STOP” to 22660 to cancel, or
“HELP” for technical assistance.

It’s that easy!

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Check out past BFEM webinars
on ECLKC!

<http://bit.ly/2sibgie>



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THANK YOU!



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OPEN CHAT



NETWORKING



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PFCE@eclkc.info or call (toll-free) 1-866-763-6481
<http://eclkc.ohs.acf.hhs.gov/hslc/tta-system/family>



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